Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Date Developed:

et - Arge Bargaining Unit Employees	
Position: Financial Management Specialist, GS-0501-12	Organization: BR3F

Date Issued:

All Redacts are (b)(6)

Critical Element: S	ystems Implementation	/ Support /	Coordination(30%)

Description:

Employee Name:
Main Appraiser:

Derived	General	Specific			Standards/Exception			Feedback Source
From	Measure	Measure	Level 1	Level 2	Level3	Level4	Level5	For Monitoring
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistenc y	Serves as the regional lead for financial accounting systems (e.g., Pegasys, E2, FMIS, Vitap, BTS, FedDesk, E2 and PTW), coordinates with leads on other systems (e.g., IRIS, RETA). Identifies needs and provides general training and administrati on (e	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Serves as the regional lead for financial accounting systems (e.g., Pegasys, E2, FMIS, VITAP and Business Objects) and coordinates with leads on other systems (e.g., IRIS, RETA). Identifies needs and provides general training and administration (e.g., Pegasys, E2, Documentum, business objectives). Uses judgment to determine when to escalate concerns.	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Financial Analysis and Reporting(20%)

Description:

Derived	General S	Specific	Standards/Exception							
From	Measure M	Measure	Level 1	Level 2	Level3	Level4	Level5	For Monitoring		
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Timeliness, Consistency ting to the consistency time time time time time time time time	Consistently and imely esponds to inancial managemen inquiries by researching, inalyzing, reporting and following hrough. Raises concerns	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Timely responds to financial management inquiries by researching, analyzing, reporting, trending and/or following through. Analysis and reporting are clear, complete and accurate. Any follow up issues are timely addressed. Raises concerns when appropriate.	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Cente		

This worksheet is only intended to assist you in completing the OFFICIAL Associate Performance Plan and Appraisal documents as identified by GSA Order CPO P 9430.1

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: (b) (6) Position: Financial Management Specialist, GS-0501-12 Organization: BR3F

Main Appraiser:(b) (6) Date Issued: (b) (6)

Dei	rived	General	Specific		Standards/Exception							
Fro	om	Measure	Measure	Level 1	Level 2	Level3	Level4	Level5	For Monitoring			
			when									
			appropriate.									

Critical Element: Internal and External Customer Relationship Management(25%)

Description:

Derived	General	Specific			Standards/Exception			Feedback Source
From	Measure	Measure	Level 1	Level 2	Level3	Level4	Level5	For Monitoring
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistenc y	Builds rapport and working relationship with colleagues (within division) and customers (within region, CO, Finance Center and contractors/ independen t reviewers), consistently and timely provides services and products to them, anticipates their needs	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Builds rapport and working relationship with colleagues (within division) and customers (within region, CO, Finance Center and contractors/independent reviewers), timely provides services and products to them, anticipates their needs and ensures coverage and continuity of work.	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Internal Process Improvements and Special Projects(15%)

Description:

Derived	General	Specific			Standards/Exception			Feedback Source
From	Measure	Measure	Level 1	Level 2	Level3	Level4	Level5	For Monitoring
Position	Quality,	Provides	Does not meet performance	Partially meets performance	Provides recommendations for	Meets and often exceeds	Meets and consistently exceeds	Supervisor,
Description	Timeliness,	recommend	expectations as defined in	expectations as defined in	improvements and identifies	performance expectations as	performance expectations as	directors/ARA/RA, other
(PD), GSA	Consistenc	ations for	Level 3.	Level 3.	best practices and lessons	defined in Level 3.	defined in Level 3.	managers, colleagues,
goals,	У	improveme			learned. Timely attends			customers, CO, Finance Cente
CFO/ARA/RA		nts and identifies			relevant meetings and			
Performance					conference calls.			
Plans		best practices			Demonstrates ability to problem solve and complete			

This worksheet is only intended to assist you in completing the OFFICIAL Associate Performance Plan and Appraisal documents as identified by GSA Order CPO P 9430.1

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: (b) (6) Position: Financial Management Specialist, GS-0501-12 Organization: BR3F

Main Appraiser (b) (6) Date Issued: (b) (6)

Derived	General	Specific			Standards/Exception			Feedback Source
From	Measure	Measure	Level 1	Level 2	Level3	Level4	Level5	For Monitoring
		and lessons			other projects timely.			
		learned.						
		Consistentl						
		y and						
		timely						
		attends						
		relevant						
		meetings						
		and						
		conference						
		calls.						
		Demonstrat						
		es ability to						
		problem						
		solve and						
		complete						
		other						
		projects						
		timely.						

Critical Element: Open Item Support(10%)

Description:

Derived	General	Specific			Standards/Exception			Feedback Source
From	Measure	Measure	Level 1	Level 2	Level3	Level4	Level5	For Monitoring
Position	Quality,	Supports	Does not meet performance	Partially meets performance	Supports coordination of	Meets and often exceeds	Meets and consistently exceeds	Supervisor,
Description	Timeliness,	coordinatio	expectations as defined in	expectations as defined in	regional open items to include	performance expectations as	performance expectations as	directors/ARA/RA, other
(PD), GSA	Consistenc	n of	Level 3.	Level 3.	monitoring of open items,	defined in Level 3.	defined in Level 3.	managers, colleagues,
goals,	у	regional			timely responses to inquiries			customers, CO, Finance Center
CFO/ARA/RA		open items			and necessary training. Uses			
Performance		to include			judgment to determine when to			
Plans		monitoring			escalate issues.			
		of open						
		items,						
		timely						
		responses						
		to inquiries						
		and						
		necessary						
		training.						
		Uses						
		judgment to						
		determine						
		when to						
		escalate						
		issues.						

This worksheet is only intended to assist you in completing the OFFICIAL Associate Performance Plan and Appraisal documents as identified by GSA Order CPO P 9430.1